



MARS Reporting & Querying "Power User" Guide

For the Power User only

Working with Ad hoc Documents

https://mars.rdc.noaa.gov



January 2014 1

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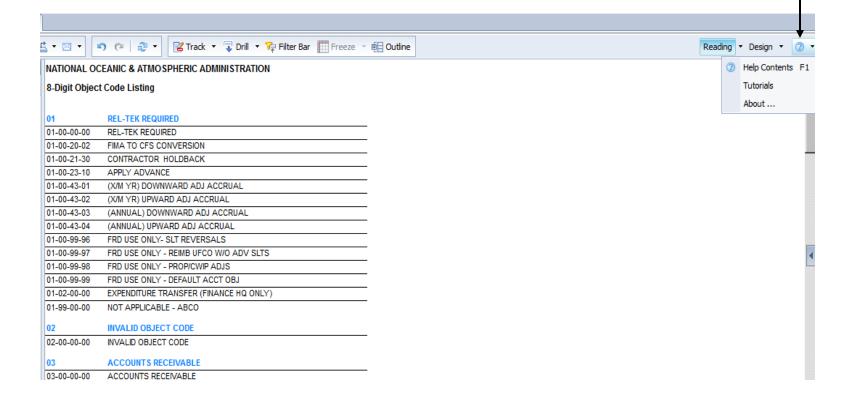
Creating Webl Documents

Creating Webl Documents

- The Creating Webi Documents section covers query building and document management. The resulting report is left in it's default format in this section.
- The next section called Report Formatting will teach you how to work with report formatting.

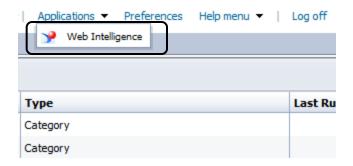
Creating Webi Documents: Getting WebIntelligence Help

- Additional help for building queries and formatting reports can be read on-line.
- You must be in View mode or Edit mode of a document to access this help.
- Click the Help.

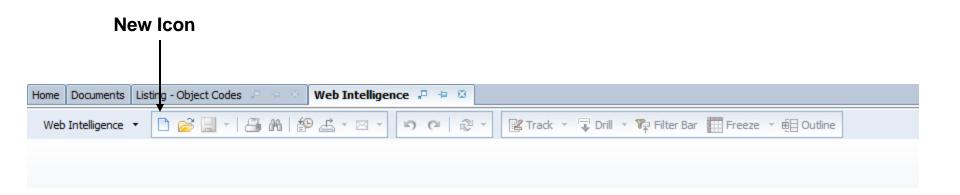


Help Icon

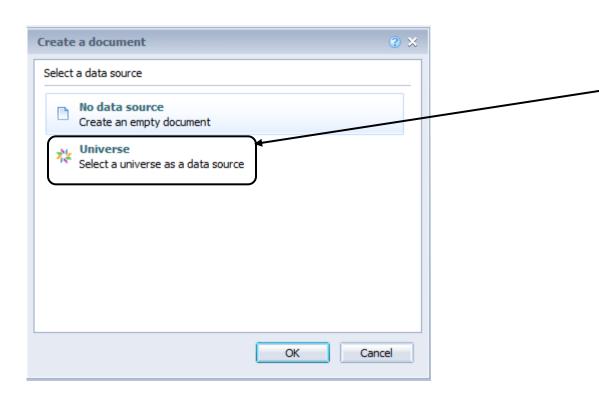
Creating WebI Documents



- From the Application drop-down menu select Web Intelligence.
- You are now presented with Web Intelligence Application.
- Click on "New" icon to create
 New Web Intelligence document.



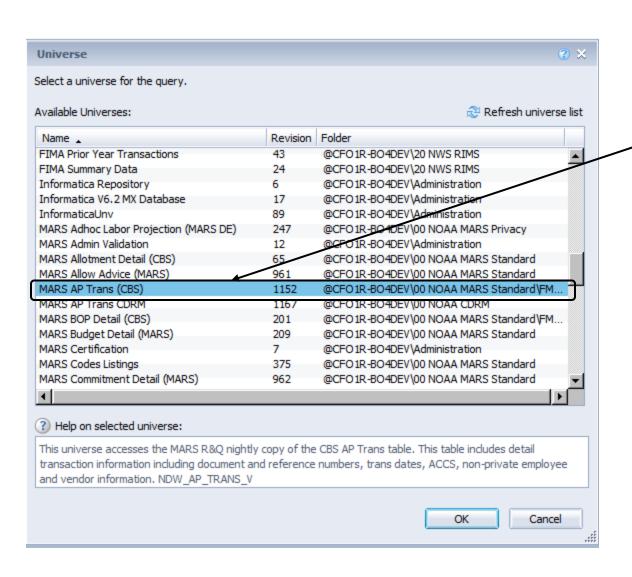
Creating WebI Documents



In "Create a document" dialog box select "Universe" and click "Ok" button.

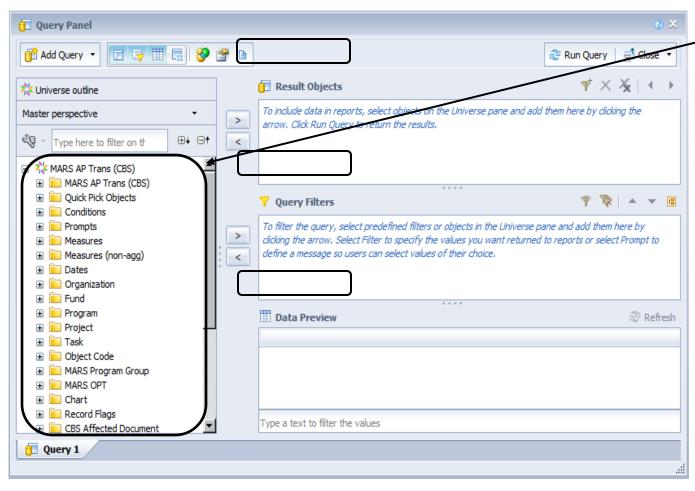
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Creating WebI Documents

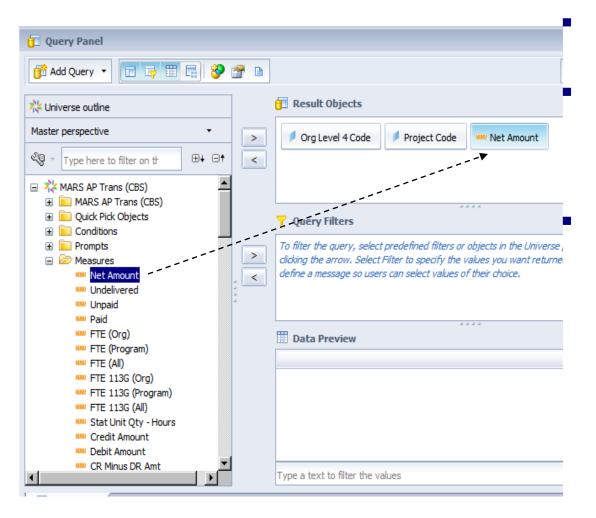


- You are presented with a list of universes.
 - For this exercise choose MARS AP Trans (CBS).
- And click "Ok" button.
 - NOTE: The universes in the list is controlled by the user access rights.
- This screen is showing the universes available for use by a standard MARS user.

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- The objects available in the Universe selected are in the folders to the left.
- Note that there is a Result Objects pane, a Query Filters pane and Data Preview pane.



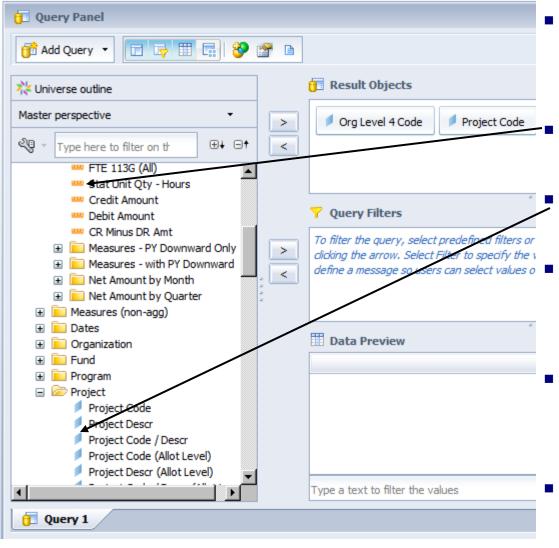
Select desired objects to include in the document as follows:

Click "+" to open the following folders to see the objects:

- Measures
- Organization
- Project

Click and drag (or double click) the following objects to include them on the Result Objects Pane:

- Org Level 4 Code
- Project Code
- Net Amount



Notice that the objects in the Measures folder have a gold icon and the objects in the Organization folder have a blue icon.

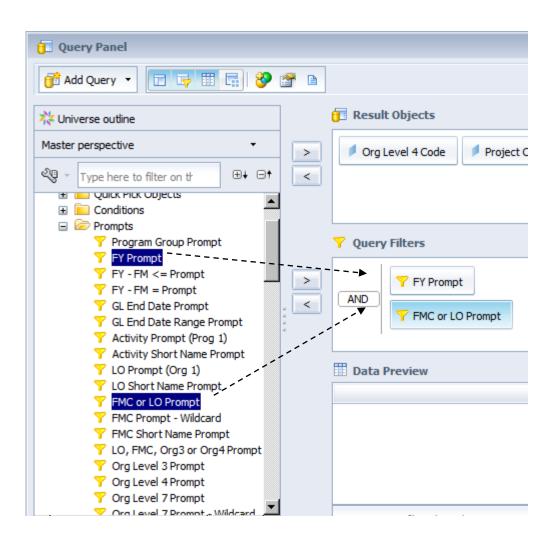
The *gold icon* designates a *Measure* object.

The *blue icon* designates a *Dimension* object.

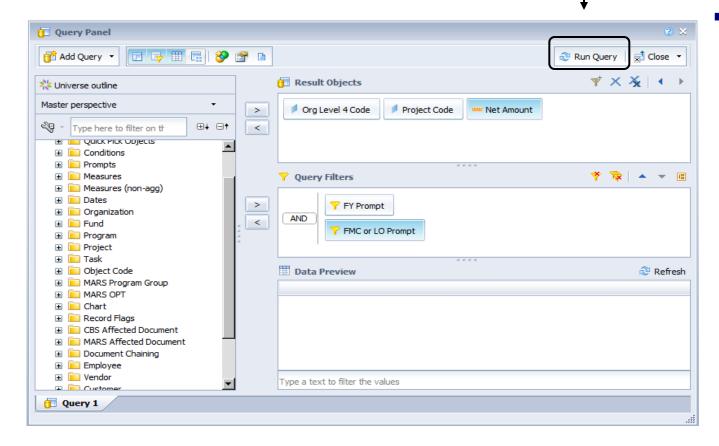
A Measure is a value that will be aggregated based on the selected dimensions, such as dollars, FTE and employee counts.

A Dimension is a value that categorizes the Measure, such as Fund, Project, Organization or Object Class.

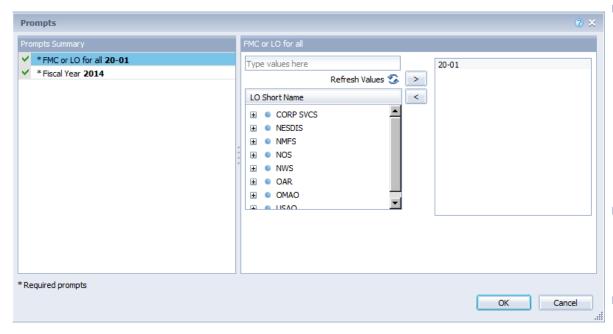
Keep the terms Measure and Dimension in mind, as they may be used later in this User Guide.



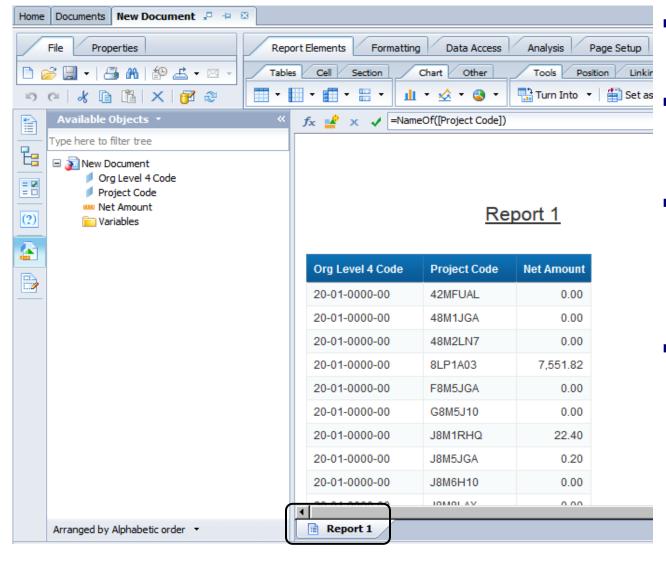
- To reduce the number of rows returned and speed up query performance, add some query filters. You will learn more about query filters later in this guide.
- Click "+" to open the following folders and see the objects:
 - Prompts
- Click and drag (or double click) the following objects to include them on the Query Filters Pane:
 - ☐ FY Prompt
 - □ FMC or LO Prompt



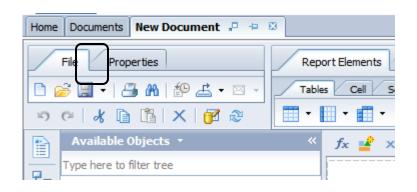
 Click Run Query to execute the query.



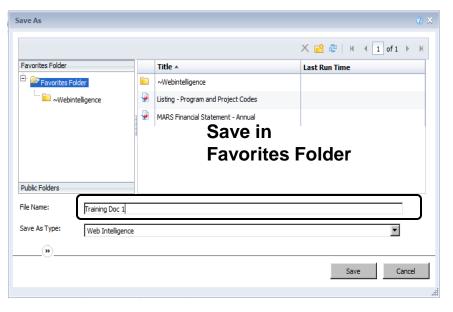
- When the *Prompts* screen appears, click on the prompt text in the upper part of the screen and either type in the desired value or select it from the list of values in the lower part of the screen.
- If the list of values is empty, click the Refresh Values button.
- Click Run Query to execute the query with the select parameter.
- If the Run Query button is not available, it is because you have not answered all the prompts.

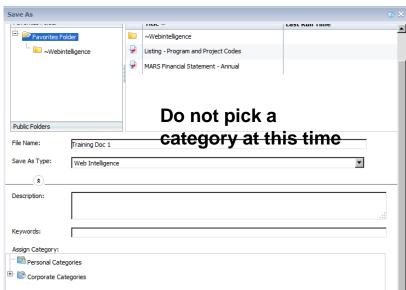


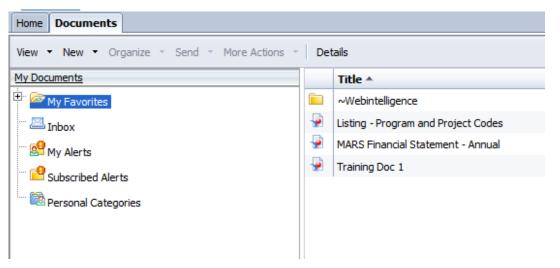
- The query is processed and your are switched to the Design mode.
- The results of the query are placed in a report tab (Report 1) in the default report format.
- The only time objects are placed in a report tab is the first time you run a query. New objects added to the query will have to be moved to the report tab(s) manually.
- Note that the rows going down are sorted first by column 1 (FCM), then column 2 (Project Code), etc. Column order and row sorting can be modified and will be covered in the Report Formatting section.



- Click Save (Diskette Icon) to save your document.
- The first time you click save, you will be prompted to select a folder and document name. Optionally you can specify a personal category.
- From the Save Document pop-up window, select Favorites Folder and do not select a Personal Category at this time.
- In the *Name* field, enter '*Training Doc 1*'.

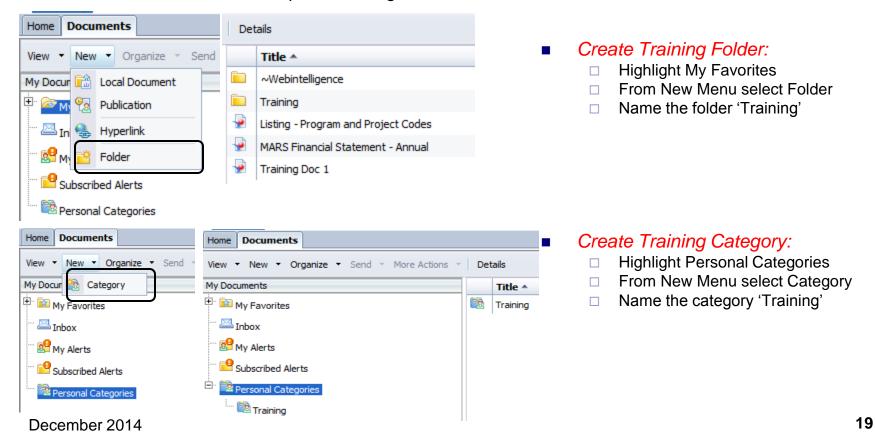


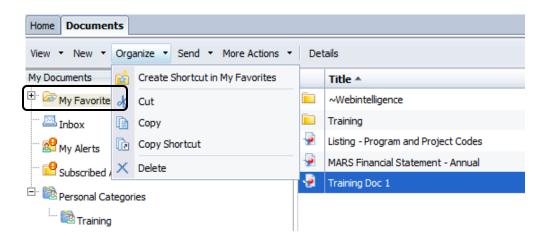


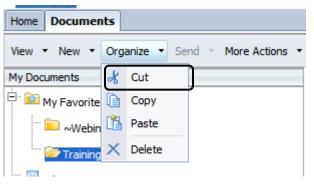


- Each user has a Personal Folder area for storing Personal Documents called *My Favorites*.
- Personal Documents are either:
 - Created by the user
 - Sent by another user
 - Copies from Corporate Documents
- To see Personal Folders click Documents -> My Documents.

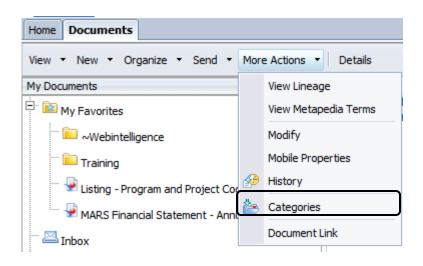
- Each user can create subfolders and/or sub-categories to keep their personal documents organized.
- Personal documents and folders are stored on the Business Objects server at the ITC, not locally on the user's PC.
- Note that the subfolders under the Public Folders folder are hidden by design. Users are unable to save to Public Folders or Corporate Categories.

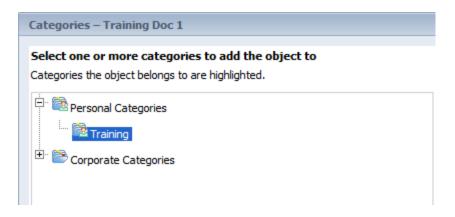




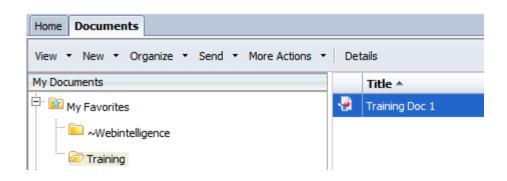


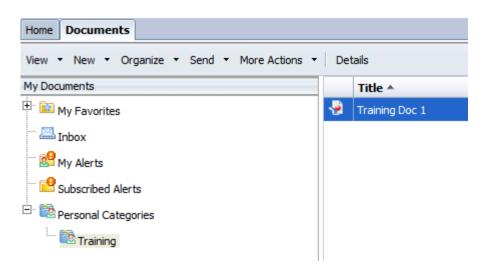
- Your document has been saved in the My Favorites folder.
- To find your document, click <u>Documents</u> -> <u>My Documents</u>. Click on the <u>My Favorites</u> folder.
- You can move a document using the Cut and Paste options under the Organize Menu.
- Move Training Doc 1 . . .
- Cut from My Favorites
 - Click on My Favorites
 - Click on the 'Training Doc 1'
 - From the Organize Menu, select Cut
- Paste into Training
 - Click on the + next to My Favorites
 - Click on the Training folder
 - From the Organize Menu, select Paste





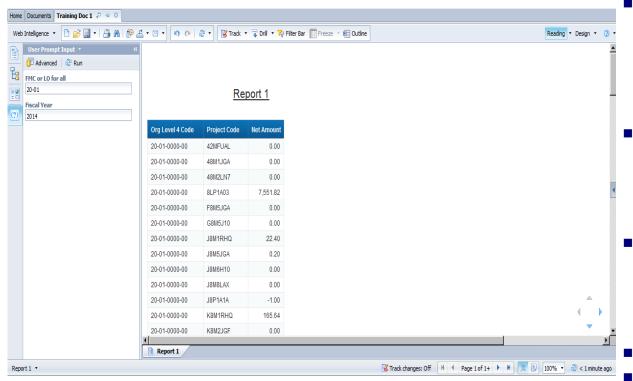
- When you saved Training Doc 1, you were instructed not to specify a category.
- In a subsequent step, you created the Training category.
- Assign Training Doc 1 to the Training category as follows:
 - □ From the More Actions Menu, select Categories
 - Open Personal Categories and click on Training
 - Click OK





- Now you should be able to find your document in both the *Training folder* and the *Training category*.
- Typically, there would be no need to have both a category and folder for the same subject.
- You may choose to use only folders for organizing your documents, or you may choose to put all your documents in one folder and use categories to keep organized. Both were created in this exercise purely for training purposes.

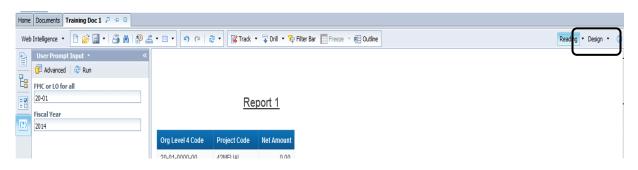
Creating WebI Documents: Recalling a Document

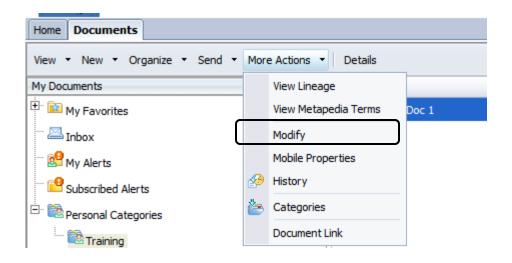


- To use the document you have just saved, simply navigate to the appropriate folder or category and double click on the document name.
- The document will be opened in Reading mode. You cannot change the query or report layout in Reading mode.
- The data you see when you open a document is the data from the last time the document was saved.

Open Training Doc 1

Click Refresh Data to retrieve the latest data and/or change the prompt parameters.

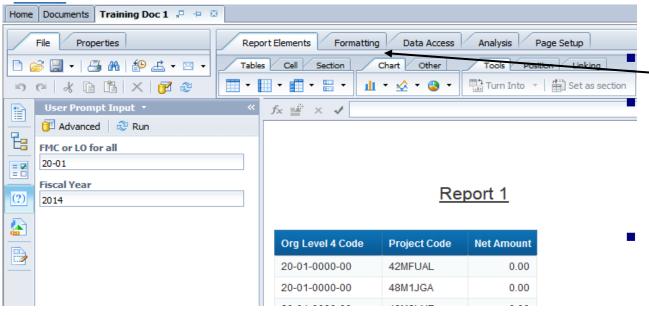




- To make changes to the query of report layout you must open the document for editing in one of two ways:
- While in view mode
 - Double click the document to return to Reading mode
 - Click on the <u>Design</u> option

Or . . .

- From the Detail Panel
 - Highlight the document in the Detail Panel
 - From the More Actions Menu, select Modify

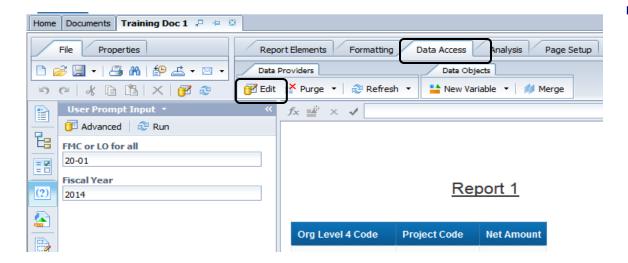


Open Training Doc 1 for editing.

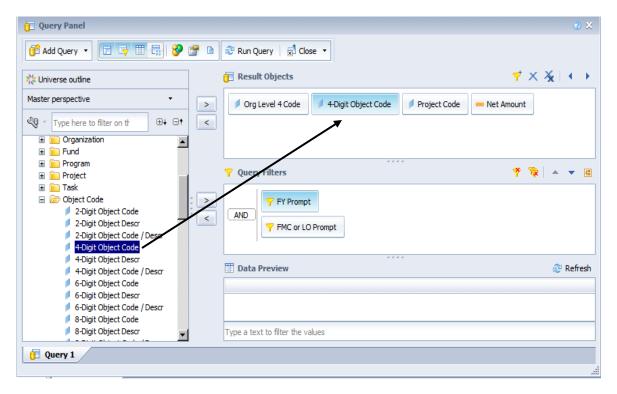
You will be in **Design mode**.

It is from the *Design mode* that you will be able to do the advanced report structuring and formatting that is covered in later sections.

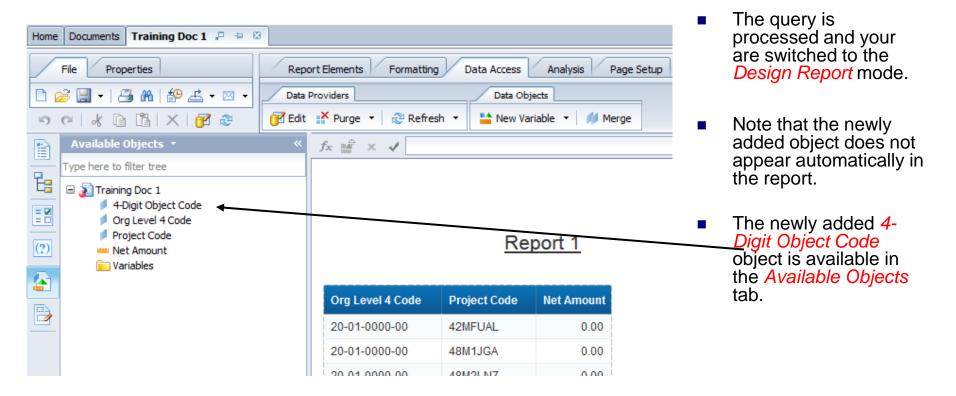
For this lesson you will learn how to add and delete columns from the query and report.

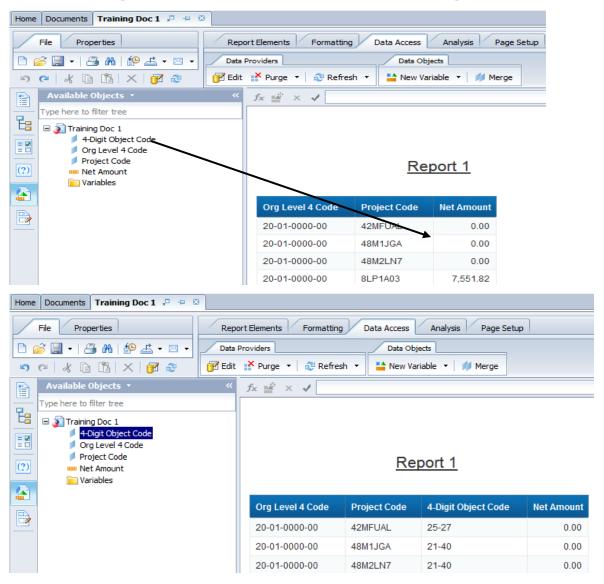


To Edit the Query, click on "Data Access" and then click on "Edit" under "Data Providers"



- Add 4-Digit Object Code to your query as follows:
 - Open the Object Code folder
 - Click and drag (or double click) the 4-Digit Object Code so that it appears in the Result Objects
 - □ Click Run Query
- To remove objects from your query, simply click and drag them out of the Result Objects panel.
- Alternatively, you can highlight the object and press the delete key.

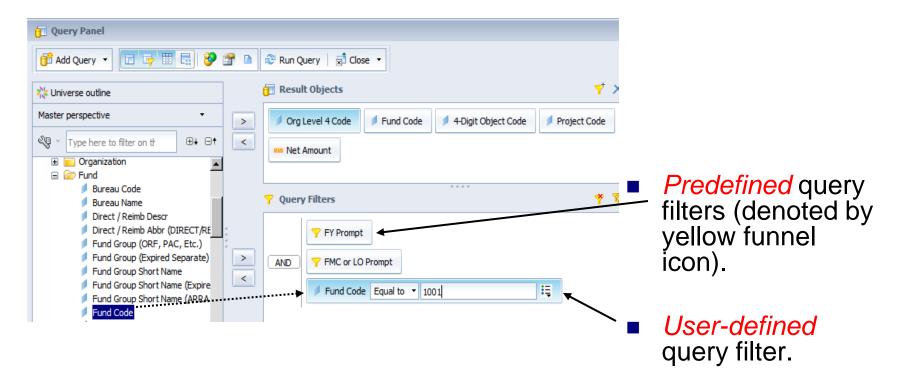




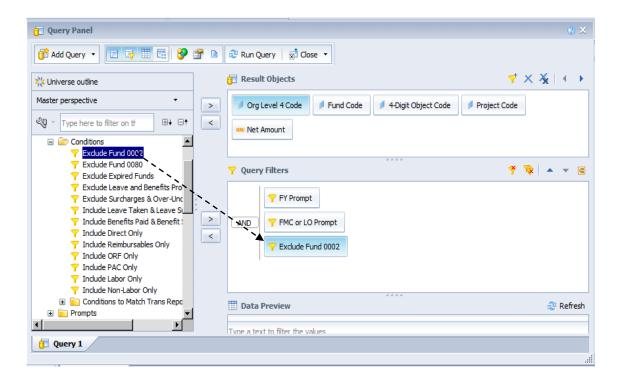
- To add objects from Available Objects tab to report, drag and drop onto appropriate place in the report.
- As you drag object over table, a tooltip will display, indicating the correct place to drop data object. The tooltip in the screen shown says 'Drop here to insert a cell'. It is also possible to replace a cell.
- Drag and drop the 4-Digit Object Code between Project Code and Net Amount.
- Save your document after each change by clicking the Save button.

- O What Are Documents Filters?
 - Restrictions or conditions OPTIONALLY added to queries to limit data retrieved from data sources
- o Why Use Them?
 - To retrieve only pertinent data
 - Generally reduces query time

- Two Types
 - Predefined
 - OBuilt by MARS administrators
 - OAvailable in all universes for use in document creation
 - OCan be found in Prompts and Conditions folders
 - User-Defined
 - OBuilt within a document
 - OApplicable only in that document

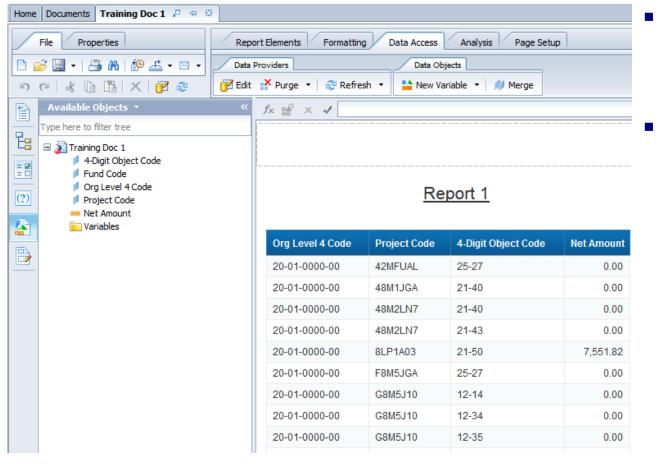


Filtering Document Queries: Predefined Filters



- Open for editing Training 1
 Doc from the previous
 lesson.
- Switch to Design mode.
- Click on "Data Access" & then click on "Edit"
- Note that you have already used two predefined query filters from the *Prompts* folder
 - □ FY Prompt
 - ☐ FMC or LO Prompt
- Open the Conditions folder and add the following object to the Query Filters pane:
 - Exclude Fund 0002
- Click Run Query
- Click Save

Filtering Document Queries: Predefined Filters



Note that the report no longer includes project codes from the Internal Fund (fund code 0002).

Click Save

Filtering Document Queries: Pre-Defined Filters

- The pre-defined filters in the Conditions folder filter the data as stated in the object name, for example: 'Exclude Fund 0002'.
- The pre-defined filters in the Prompts folder filter the data based on a value or values supplied by the user of the document.
- It is quicker to double click a pre-defined filter than it is to build a user-defined filter. Be sure to browse through these folders to see what is available. Every MARS Universe has a Conditions and Prompts folder.

- Query Filters—Different Types
 - Single Value FMC Equal to 20-01
 - Multi Value
 FMC *In List* 20-10; 20-20
 - Prompted Value
 FMC Equal to ("Enter FMC")
 Prompted Values can be required or optional
 - Complex
 Fund Code Equal to 0085
 OR
 (Fund Code Fiscal Year Equal to 2005
 AND Fund Code Equal to 0036)

 Query Filters (including Predefined filters) have three components

Object Operator Operand

Example: LO Equal to '20'

- 1) Object: Object from the Universe
- 2) Operator: Identifies relationship to operand
 - (e.g. Equal to, Less Than, Matches Pattern, etc.)
- 3) Operand: A value
 - Can be explicit value, user supplied value (prompt), another object, or another query (subquery)

Operators (page 1 of 2)

Operator	Description	Example	
Equal to	Exactly matches value	FMC Equal to 20-01	
Not Equal To	Anything other than value	FMC Not Equal To 20-01	
Greater than	Greater than value	FMC Greater than 20-01	
Greater than or equal to	Greater than or equal to value	Net Amount Greater than or equal to 10,000	
Less than	Less than value	Trans Date Less than 9/1/2006	
Less than or equal to	Less than or equal to value	Net Amount Less than or equal to 10,000	
Between	Between the two values specified, also including the two values specified	FMC Between 20-10 and 20-60	
Not Between	Not between TWO values specified nor equal to either value	FMC Not Between 20-10 and 20-60	

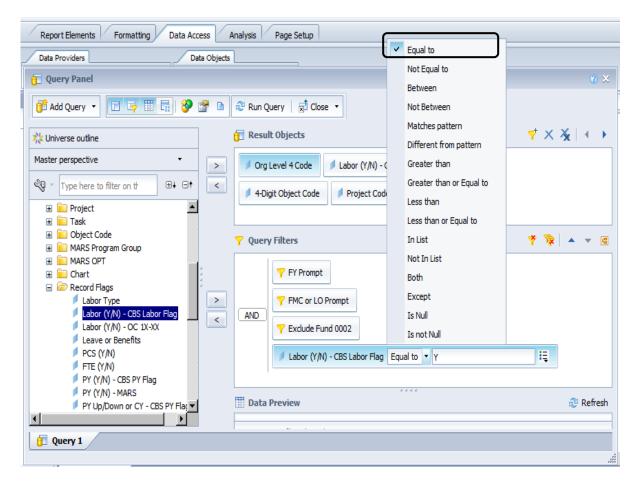
Operators (page 2 of 2)

Operator	Description	Example
In List	Matches at least one of the values listed	FMC In List 20-10;20-20
Not In List	Different from the values listed	FMC Not In List 20-10;20-20
Is null	Has no value, as when a data column is empty	Affected Reference No Is null
Is not null	Has a value, as when a column contains data	Downward Net Amount Is not null
Matches pattern	Includes the specified string	Project Code Matches pattern 8MIJ%
Different from pattern	Does not include the specified string	Org Level 7 Code Different from pattern 209%

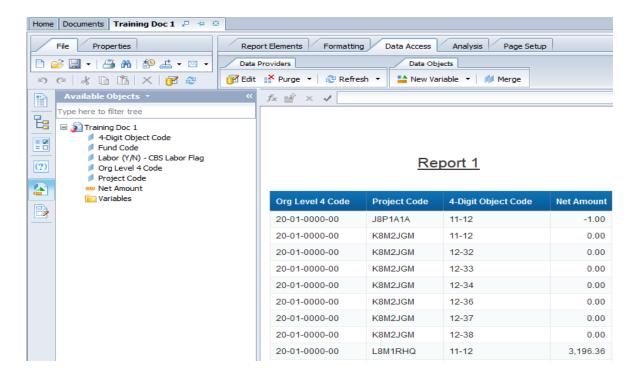
- Operators —A Few Notes
 - The following operators can be applied to strings (character data), numbers and dates:
 - O Greater than / Greater than or equal to
 - O Less than / Less than or equal to
 - O Between / Not Between
 - The following operators can be applied to strings only!
 - Matches pattern / Different from pattern
 - Matches pattern / Different from pattern are only useful when used with wildcard patterns.
 - '%' represents ZERO, one, or more characters
 - Example: Last Name Matches pattern '%N%G' can return the last names NG, MANNING, and NEIBERG
 - O '_' represents one, and only one, character
 - Example: Org Level 7 Code Matches pattern 20-___-9%

Operands:

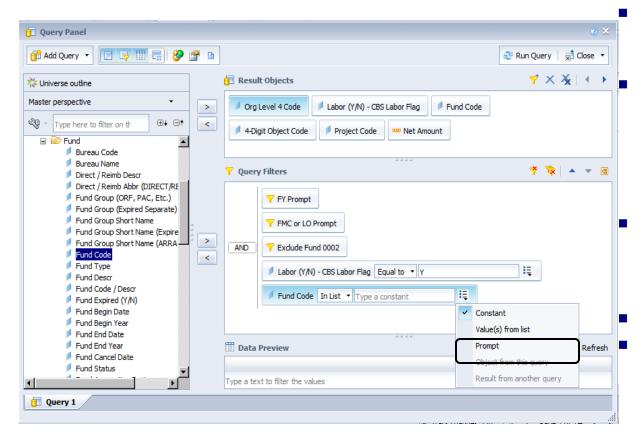
- Constant (default)
 - Document builder will enter a specific value (e.g. Fiscal Year Equal To 2008)
- Value(s) from list
 - Document builder will select values from a list of possible values for the object (e.g. Fiscal Year In List (2008;2009)
- Prompt
 - O Document builder will enter text describing the type of value the <u>Document user</u> should enter at document runtime (e.g. Fiscal Year Equal To "Enter Fiscal Year")
- Result from another query (Any)
 - O Document builder will create an additional query to use as a filter for the main query.
- Object from this query
 - Document builder will specify another object (e.g. Fiscal Year Equal To Fund Code Fiscal Year)



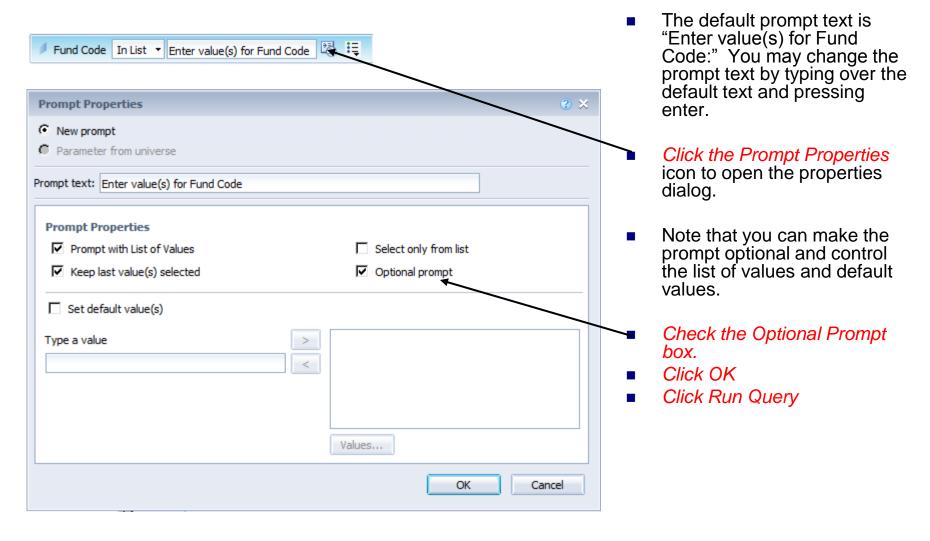
- Open for editing *Training 1 Doc* and switch to *Design Report* mode, click on "*Data Access*" and then click on "*Edit*", if you are not there already.
- Open the Record Flags folder and add the following object to the Query Filters pane:
 - □ Labor (Y/N) CBS Labor Flag
- Drop down the list of operators
 - □ Select equal to
- In the operand box the default is 'Type a constant'
 - □ Type Y
- Click Run Query
- Click Save

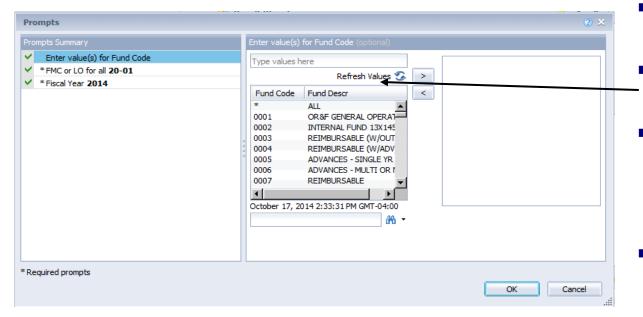


- Note that the report no longer contains object codes that are not labor.
- Click Save



- Building a User Defined Filter that Prompts for a list of values . . .
- Open for editing *Training 1 Doc* and switch to *Design Report* mode, click on "*Data Access*" and then click on "*Edit*", if you are not there already.
- Open the *Fund* folder and add the following object to the Query Filters pane:
 - Fund Code
- Leave In List as the operator.
- Select *Prompt* from the *operand* drop down.

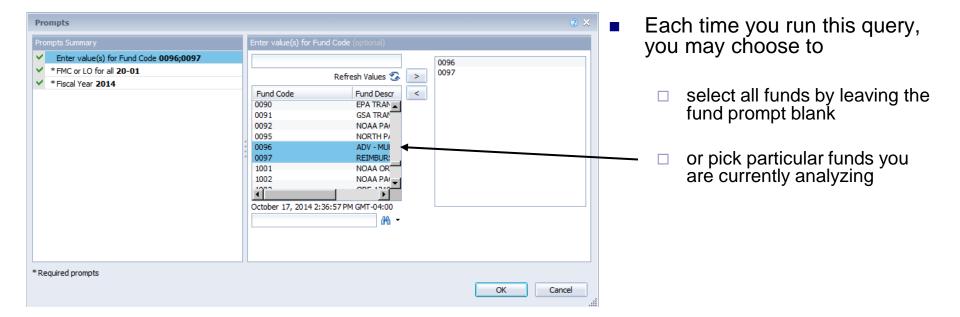


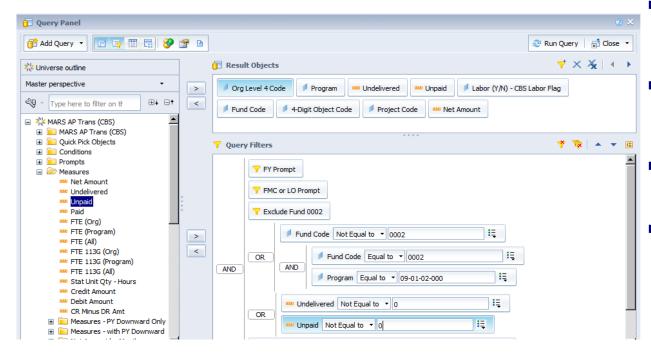


When the query is run, the prompt box will be displayed.

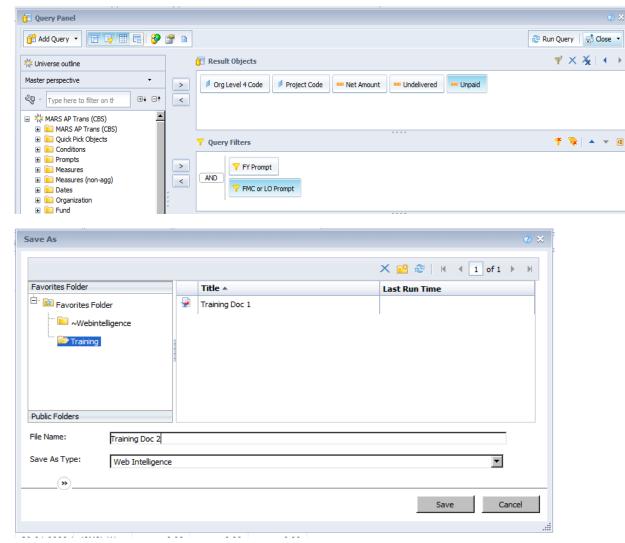
If the List of Values does not appear, click Refresh Values.

- With the new optional prompt you can either
 - Not select any funds
 - Select one fund
 - □ Select multiple funds
- Note the "*" for All will not work with a User Defined Prompt. If you want all funds, do not select any funds.
- Do not select any funds
- Click Run Query
- Click Save



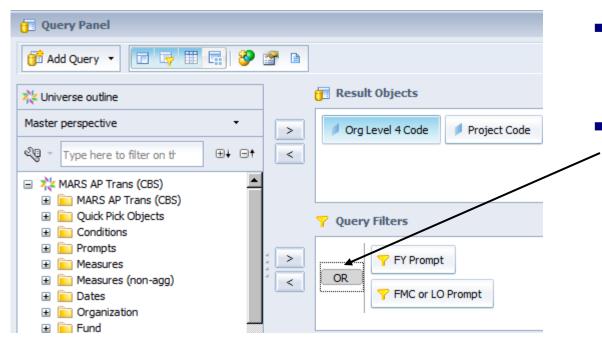


- Filters are joined together with AND and OR conjunctions.
- The AND operator requires that both filters/filter groups be true.
- The OR operator requires that either filter/filter group be true.
- Groups of filters can be prioritized to be evaluated before other filters. This is designated by right indentation.



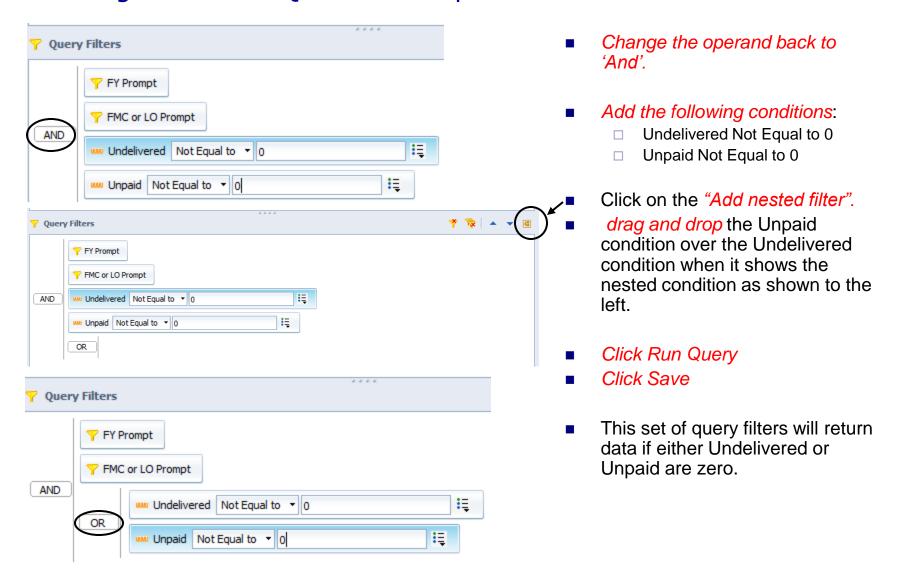
- Create a new WebIntelligence document using the MARS AP Trans (CBS) universe.
- Include the following objects:
 - Org Level 4 Code
 - Project Code
 - Net Amount
 - Undelivered
 - Unpaid
 - □ Paid
 - ☐ FY Prompt
 - ☐ FMC or LO Prompt
- Click Run Query
- Fill in prompts
- Click Save
- Name the document Training Doc 2

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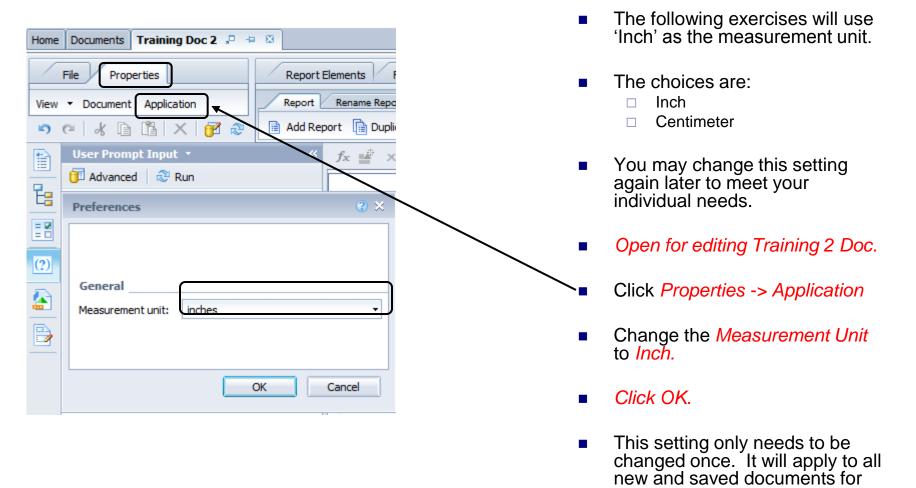
Go to the *Design Report Mode*, Click on *Data Access*,
then click on *Edit*.

Practice changing the 'And' to 'Or' and back again by doubling clicking on it.



Report Formatting

Report Formatting: WebIntelligence User Settings

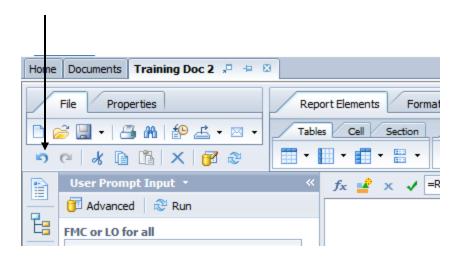


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your user ID.

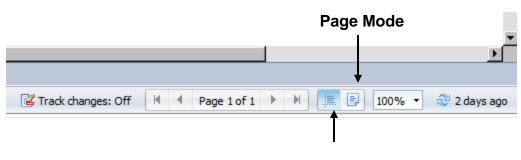
Report Formatting: Undo Formatting

- If you make a mistake while formatting a report, you can click the *Undo* button.
- Be sure to Undo before you save. Saving clears the undo cache.



Report Formatting: Page Mode / Structure Mode

- Before we begin formatting, it is important to note the modes in which you may work on a report.
 - Page mode vs. Quick Display mode
 - Design With Data mode vs. Design Structure only mode
- Page mode vs. Quick Display mode:
 - Use Page mode to see how the report will look on the printed page.
 - Quick Display mode will show you more information on a page because there will not be any page breaks or margins displayed
 - Change to Page mode by clicking the Switch Page/Quick Display button.
 - ☐ The button will appear darker when Page mode is on.
 - Click again to change back to Quick Display mode.

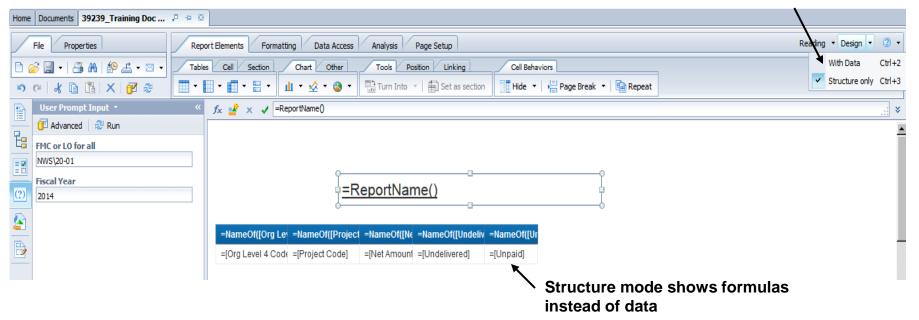


Quick Display Mode

Report Formatting: Page Mode / Structure Mode

- Design With Data mode vs. Design Structure only mode:
 - □ Design With Data mode will show you the data from the query
 - Design Structure only mode will show you formulas instead of data.
 - □ Use Structure only mode to see clearly report headers, footers, sections and formulas.
 - Change to Structure only mode by selecting Structure only from Design drop-down menu.

Toggle Design With Data / Structure only

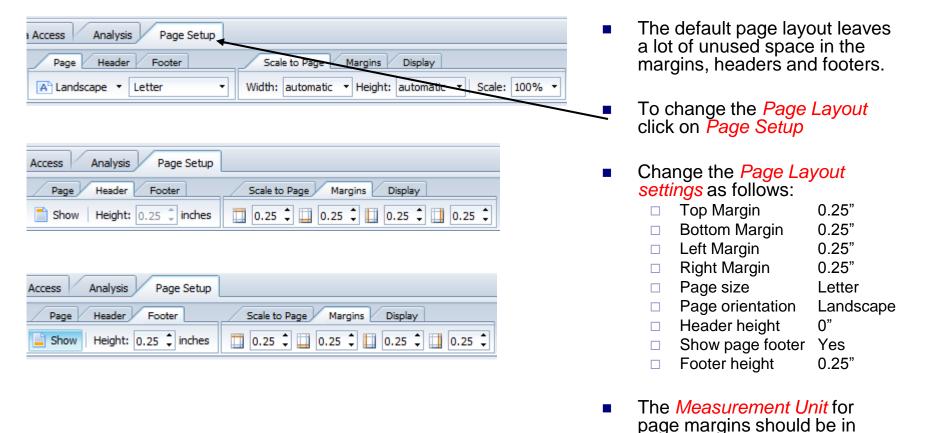


Report Formatting: Components of a Report

- Before we begin changing formats, it is important to understand the components of the report.
- It is especially important to understand that you sometimes must click on the Column Data Cell(s) rather than the Column Title Cell(s) in order to apply certain formats such as Breaks and Sections, which we will be covering later.



Report Formatting: Page Layout



Click Save.

Inches if you have changed your User Settings as specified

in the previous section.

Report Formatting: Changing Column Titles

- Change the Column Titles by double clicking in the Org Level 4 Code Table Title cell.
- Change title to 'Organization" by typing over the text in the cell.
- Click Save.

Open Obligations

=NameOf([Org Level 4 Code])	Project Code	Net Amount	Undelivered	Unpaid
20-01-0000-00	42MFUAL	0.00	-123,143.00	0.00
20-01-0000-00	J8M5JGA	0.20	-3,539.54	0.00

Open Obligations

Organization	Project Code	Net Amount	Undelivered	Unpaid
20-01-0000-00	42MFUAL	0.00	-123,143.00	0.00
20-01-0000-00	J8M5JGA	0.20	-3,539.54	0.00
20-01-0000-00	J8M6H10	0.00	-818.71	0.00
20-01-0000-00	K8M1RHQ	165.64	-2,710.47	0.00

Report Formatting: Moving Columns

- Move columns by clicking, dragging and dropping.
- Move Net Amount after the Unpaid column. *Click, drag and drop the column* in the table.
- Click Save.
- Note this technique can also be used to swap columns.

Open Obligations

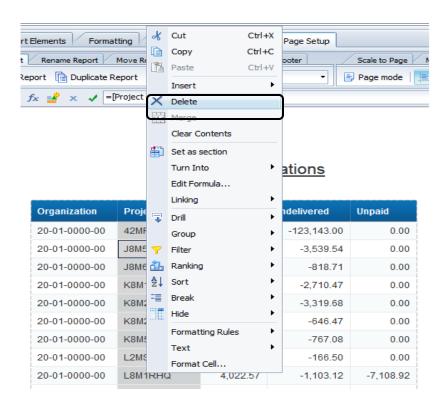
Organization	Project Code	Net Amount	Undelivered	Unpaid
20-01-0000-00	42MFUAL	0.00	-123,143.00	0.00
20-01-0000-00	J8M5JGA	0.20	-3,539.54	0.00
20-01-0000-00	J8M6H10	0.00	-818.71	0.00
20-01-0000-00	K8M1RHQ	165.64	-2,710.47	0.00

Open Obligations

Organization	Project Code	Undelivered	Unpaid	Net Amount
20-01-0000-00	42MFUAL	-123,143.00	0.00	0.00
20-01-0000-00	J8M5JGA	-3,539.54	0.00	0.20
20-01-0000-00	J8M6H10	-818.71	0.00	0.00
20-01-0000-00	K8M1RHQ	-2,710.47	0.00	165.64

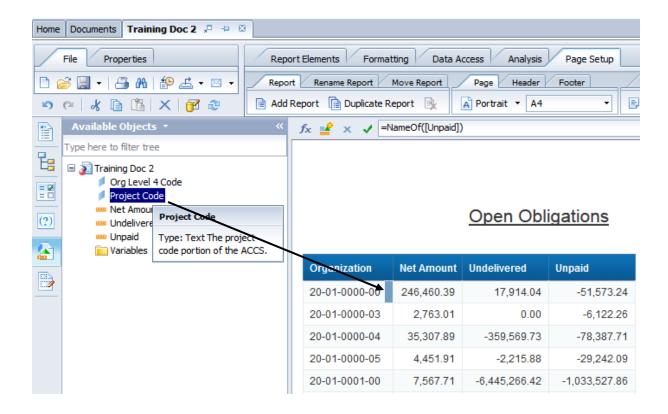
Report Formatting: Deleting Columns

- To delete a column, select the column you wish to delete.
- Right click on the Project Code column.
- Right clicking opens a Shortcut Menu.
- Select Delete.
- Click Save.



Report Formatting: Adding Columns

- If you add new objects to your query, they will not be automatically added to your report.
- Add columns from the Available Objects Tab by clicking, dragging and dropping.
- Put the Project Code back in the report after the Organization column.
- Click and drag the column and drop it in the table.
- Click Save.



Report Formatting: Change Column Width / Row Height

- There are two ways to change Column Width and Row Height.

 - Click and drag to resize
 Change the properties by typing the desired size
- Practice changing the width and height of the Project Code column by clicking and dragging.

Open Obligations Open Obligations Organization **Project Code** Undelivered Unpaid **Net Amount** Organization Project Code Undelivered Unpaid **Net Amount** 20-01-0000-00 42MFUAL -123,143.00 0.00 0.00 20-01-0000-00 0.00 42MFUAL -123,143.00 0.00 20-01-0000-00 J8M5JGA -3,539.540.00 0.20 20-01-0000-00 J8M5JGA -3,539.540.00 0.20 20-01-0000-00 J8M6H10 -818.71 0.00 0.00 20-01-0000-00 J8M6H10 -818.71 0.00 0.00 20-01-0000-00 K8M1RHQ -2,710.47 0.00 165.64 20-01-0000-00 K8M1RHQ -2,710.470.00 165.64 20-01-0000-00 K8M2JGF -3,319.68 0.00 0.00 20-01-0000-00 K8M2JGF -3,319.680.00 0.00 K8M2JGM 20-01-0000-00 -646.470.00 0.00 Height Width

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Report Formatting: Change Column Width / Row Height

- The standard for MARS Corporate Reports is to use the following settings:
 - ☐ Fixed column widths (each sized appropriately so all columns fit the page width)
 - □ Autofit height checked (minimum height of 0.17" 0.25" depending on font size)
 - Wrap text checked
- This standard ensures that the data does not go off the page as it might with Autofit widths. It also ensures that all data will be displayed even if the fixed width is not wide enough.
- The example below shows the standard settings and how it would impact the Undelivered column if it were not wide enough.

Open Obligations

Organization	Project Code	Undelivered	Unpaid	Net Amount
		-123,143.0		
20-01-0000-00	42MFUAL	0	0.00	0.00
20-01-0000-00	J8M5JGA	-3,539.54	0.00	0.20
20-01-0000-00	J8M6H10	-818.71	0.00	0.00
20-01-0000-00	K8M1RHQ	-2,710.47	0.00	165.64
00.04.0000.00	KONOTOE	2.240.00	0.00	0.00

Text is wrapped and column height is adjusted

Report Formatting: Free Standing Cells

- Single cells that stand alone in a report
- Often used in headers and footers
 - Report Title
 - Page Number
 - Last Refresh Date
 - Logos/Images
 - User Responses to Prompts

Report Formatting: Changing the Report Title

- Change the *Report Title* by double clicking in the *Free Standing Cell* containing the report title.
- Change the report title to 'Open Obligations".
- Click Save

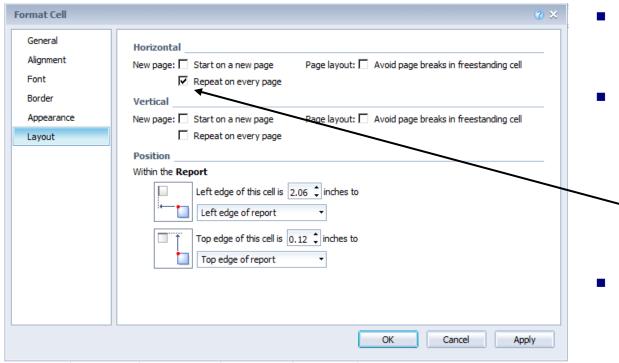


Organization	Project Code	Undelivered	Unpaid	Net Amount
20-01-0000-00	42MFUAL	-123,143.00	0.00	0.00
20-01-0000-00	J8M5JGA	-3,539.54	0.00	0.20
20-01-0000-00	J8M6H10	-818.71	0.00	0.00
20-01-0000-00	K8M1RHQ	-2,710.47	0.00	165.64



Organization	Project Code	Undelivered	Unpaid	Net Amount
20-01-0000-00	42MFUAL	-123,143.00	0.00	0.00
20-01-0000-00	J8M5JGA	-3,539.54	0.00	0.20
20-01-0000-00	J8M6H10	-818.71	0.00	0.00
20-01-0000-00	K8M1RHQ	-2,710.47	0.00	165.64

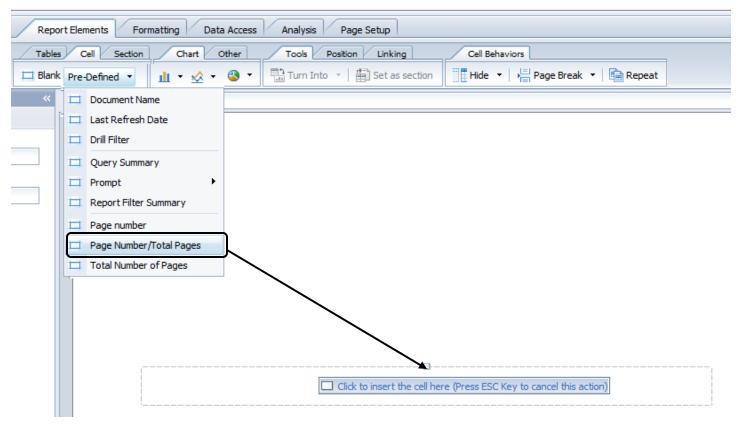
Report Formatting: Repeat on Every Page New Page



- Free Standing Cells like the Report Title will not repeat on every page by default.
- If you would like the title on every page
 - Select the cell, right click & select "Format Cell..."
 - Click on the *Layout* & Check the *Repeat on every new page* option.
- This setting should be considered each time you place a cell in the header of the report.

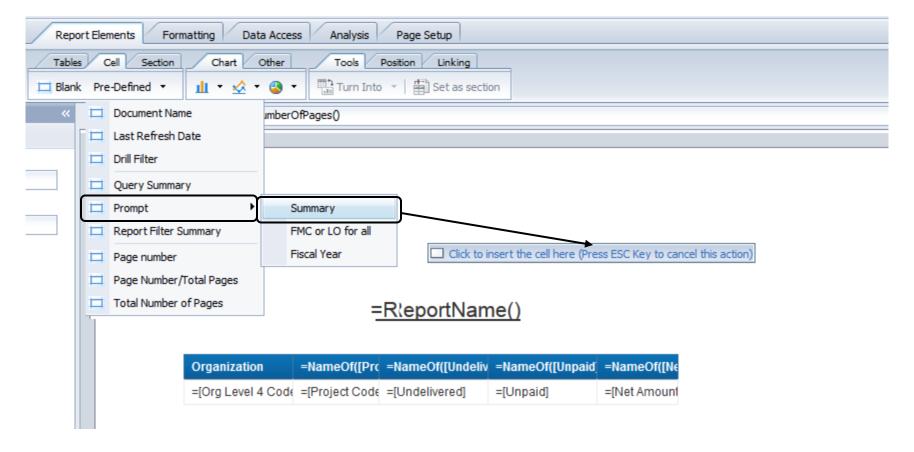
Report Formatting: Free-Standing Cell Templates

- Page Numbers can be added to the footer section of the page.
- It is easiest to see the footer section while in Page mode and Structure mode.
- Switch to Page mode and Structure only mode.
- Scroll down to the bottom of the page to see the report footer.
- Click on the Report Elements -> Cell, click on "Pre-Defined" drop-down
- Click and drag Page Number / Total Pages and drop on the Page Footer.



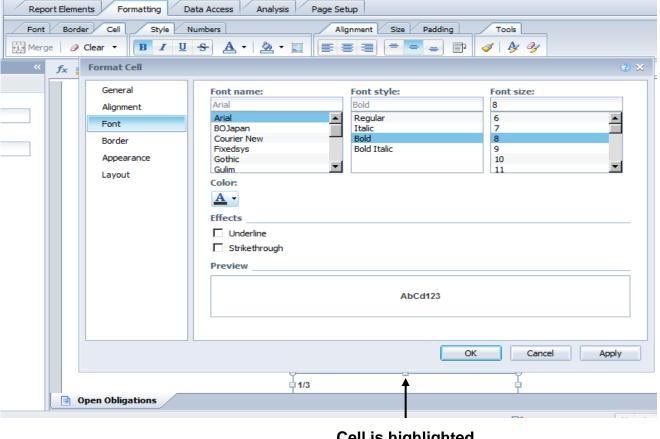
Report Formatting: Free Standing Cell Templates

- The answers to the query prompts can be added to the heading of the report.
- In the Report Elements Tab, click on "Cell" -> "Pre-Defined".
- Click Prompt -> Summary and drop next to the report title.



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Report Formatting: Formatting Toolbar

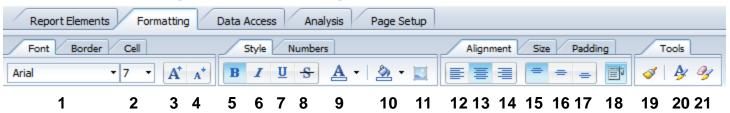


- The page number cell may not be formatted optimally.
- To change a cells properties, first click on the cell to be modified.
- Right click & Select Format Cell...
- Change the following properties of the Page Number cell:
 - Font Size → 8
 - Remove borders
 - Horizontal text alignment → Center
 - Relative Position
 - Left edge → 4.5"
 - Top edge \rightarrow 0"

Cell is highlighted

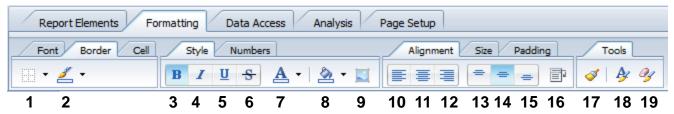
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Report Formatting: Formatting Toolbar - Font



- Much of the formatting you have been changing via the "Formatting Cell...", can also be changed via the Formatting Toolbar.
- Formatting Toolbar is divided into Font, Border, Cell, Style, Numbers, Alignment, Size, Padding & Tools
 - 1. Font
 - 2. Font size
 - 3. Grow Font
 - 4. Shrink Font
 - 5. Bold
 - 6. Italicize
 - 7. Underline
 - 8. Strikethrough
 - 9. Font color
 - 10. Background color
 - 11. Background image
 - 12. Align Left
 - 13. Align Center
 - 14. Align Right
 - 15. Align Top
 - 16. Align Center
 - 17. Align Bottom
 - 18. Wrap Text
 - 19. Format Painter
 - 20. Formatting (Display Formatting Options)
 - 21. Clear Format

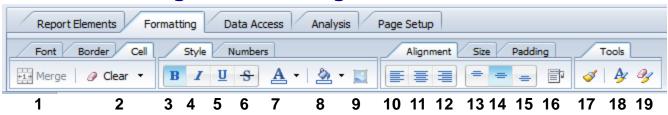
Report Formatting: Formatting Toolbar - Borders



- 1. Borders
- 2. Borders Color
- 3. Bold
- 4. Italicize
- 5. Underline
- 6. Strikethrough
- 7. Font color
- 8. Background color
- 9. Background image
- 10. Align Left
- 11. Align Center
- 12. Align Right
- 13. Align Top
- 14. Align Center
- 15. Align Bottom
- 16. Wrap Text
- 17. Format Painter
- 18. Formatting (Display Formatting Options)
- 19. Clear Format

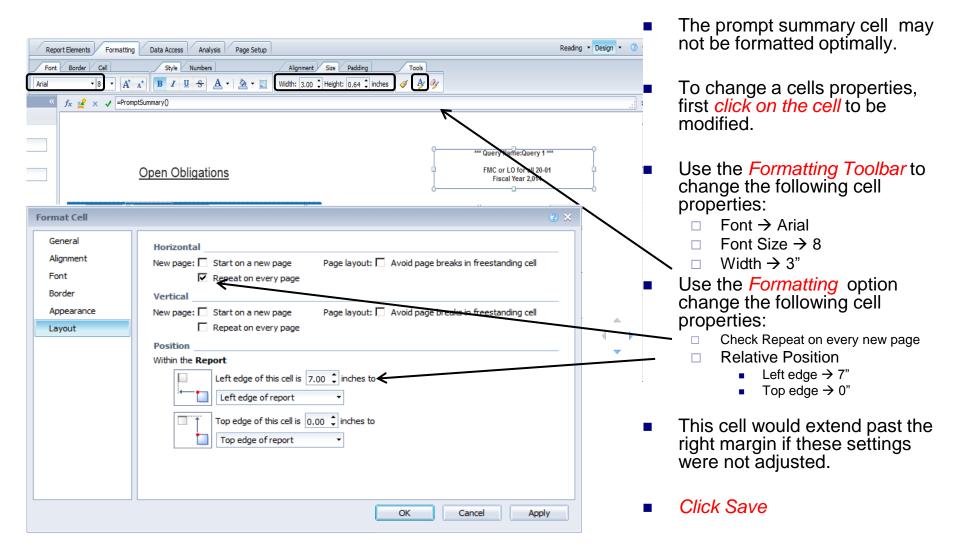
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Report Formatting: Formatting Toolbar - Cell



- 1. Merge
- 2. Clear
- 3. Bold
- 4. Italicize
- 5. Underline
- 6. Strikethrough
- 7. Font color
- 8. Background color
- 9. Background image
- 10. Align Left
- 11. Align Center
- 12. Align Right
- 13. Align Top
- 14. Align Center
- 15. Align Bottom
- 16. Wrap Text
- 17. Format Painter
- 18. Formatting (Display Formatting Options)
- 19. Clear Format

Report Formatting: Formatting Toolbar



Report Formatting: Formatting Toolbar

- Formatting changes can be made to multiple columns at one time.
- Hold down your CTRL key and single click on the cell(s) you would like to format.
- Single click on the data cells in the Undelivered column so that it is highlighted.
- Hold CTRL key and click on the data cells in the Unpaid and Net Amount columns.

Open Obligations

Organization	Project Code	Undelivered	Unpaid	Net Amount
20-01-0000-00	42MFUAL	-123,143.00	0.00	0.00
20-01-0000-00	J8M5JGA	-3,539.54	0.00	0.20
20-01-0000-00	J8M6H10	-818.71	0.00	0.00
20-01-0000-00	K8M1RHQ	-2,710.47	0.00	165.64
20-01-0000-00	K8M2JGF	-3,319.68	0.00	0.00

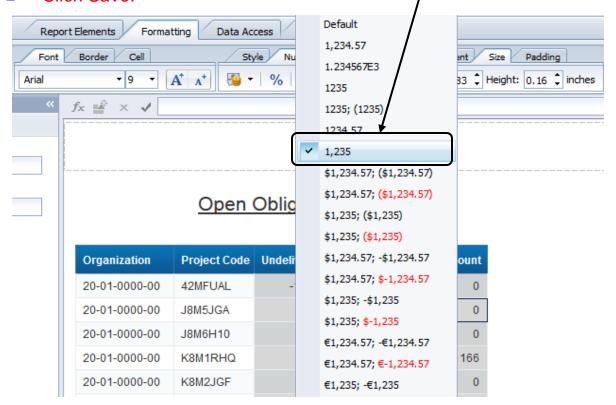
Report Formatting: Formatting Toolbar

- Once all cells have been highlighted, any properties changed will impact all selected cells.
- To change the Number Format , from Formatting Toolbar, click Numbers and then click on format drop-down.

From the Number Format dialog select the 1,234 format which will show the number without the decimals.

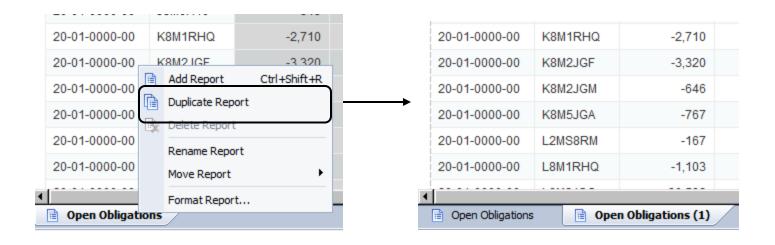


Click Save.

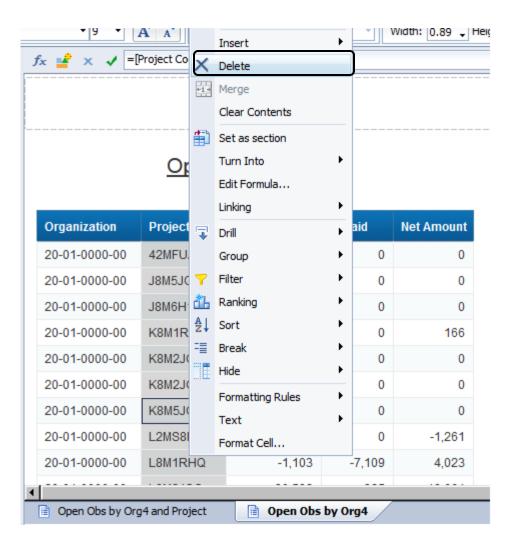


- Report Tabs allow you to present the data from the report query or queries in a variety of formats.
- When a report is refreshed, all the report queries are run at once and all the report tabs are updated with the new data.
- Each report tab could show similar information but at a different level of detail.
- Each report tab could be identical in formatting, but differ in the filters that are applied.

- Similar to an Excel worksheet, a Web Intelligence document can have multiple reports (aka tabs).
- Frequently new report tabs are created by duplicating an existing tab.
- To create a copy of Open Obligations, right click on the Open Obligations tab.
- From the Shortcut Menu, select Duplicate Report.



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- To rename the Report Tabs, right click on the Report and select Rename Report.
- Change the names as follows:
 - □ Open Obligations → Open Obs by Org4 and Project
 - □ Open Obligations(1) → Open Obs by Org4
- Remove Project Code from the Open Obs by Org4 tab
 - right click on the data in the project code column
 - select Remove / Remove Column from the Shortcut Menu
- Now you have an additional tab with the data summarized by Org4.
- Click Save

Open Obs by Org4

n Undelivered Unpaid Net An	mount
-00 17,914 -51,573 246	6,460
-03 0 -6,122 2	2,763
-04 -359,570 -78,388 35	5,308
-05 -2,216 -29,242	4,452
-00 -6,445,266 -1,0 Add Report	t
-01 -1,002,105 - Duplicate Re	
-02 -443,350 - Delete Repo	ort
-03 -81,817 - Rename Rej	port
-04 -91,547 - Move Repor	rt
Format Rep	ort
by Org4 and Project	J 4

- In addition to Rename, the other Report Tab functions are:
 - □ Add
 - Duplicate
 - Delete
 - Move Report (First / Previous / Next / Last)
- Try moving a Report. Right click on the Report Tab and select Move Report / First.
- Click Save.

Advanced Report Formatting

Breaks

 Used to group report data within a table and provide a header and footer for each break value. The footer is used for placing sums and other calculations.

Sections

 Used to split report information into smaller, more comprehensible parts. Sections generate a navigation map used to jump from one section to another.

Calculations

 Calculations such as sum, min, max, average, percent can be applied to tables, breaks and sections.

Sorts

 Apply sorts to the values displayed in tables, breaks or sections. Sort in ascending, descending or customized sort order.

Cross-Tabs (Pivot Tables)

 Crosstabs display values for dimensions across the top axis and on the left axis. The body displays the values of a measure that correspond to the cross-section of the dimensions.

Advanced Report Formatting: Breaks

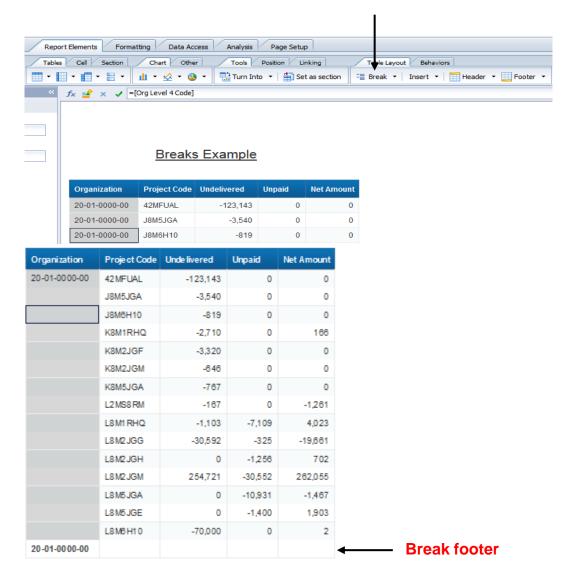
Breaks Example

Organization	Project Code	Undelivered	Unpaid	Net Amount
20-01-0000-00	42MFUAL	-123,143	0	0
20-01-0000-00	J8M5JGA	-3,540	0	0
20-01-0000-00	J8M6H10	-819	0	0
20-01-0000-00	K8M1RHQ	-2,710	0	166
20-01-0000-00	K8M2JGF	-3,320	0	0
20-01-0000-00	K8M2JGM	-646	0	0
20-01-0000-00	K8M5JGA	-767	0	0
20-01-0000-00	L2MS8RM	-167	0	-1,261
20-01-0000-00	L8M1RHQ	-1,103	-7,109	4,023
Open Obs by Or	Breaks Exam			

- Open for editing Training Doc 2.
- Duplicate the first tab to create a tab where you can practice applying Breaks.
- Switch to the Open Obs by Org4 and Project tab.
- Right Click on the tab name to open the Shortcut menu.
- Click Duplicate Report.
- Right Click on the tab name to open the Shortcut menu.
- Click Rename Report.
- Change the name to Breaks Example.

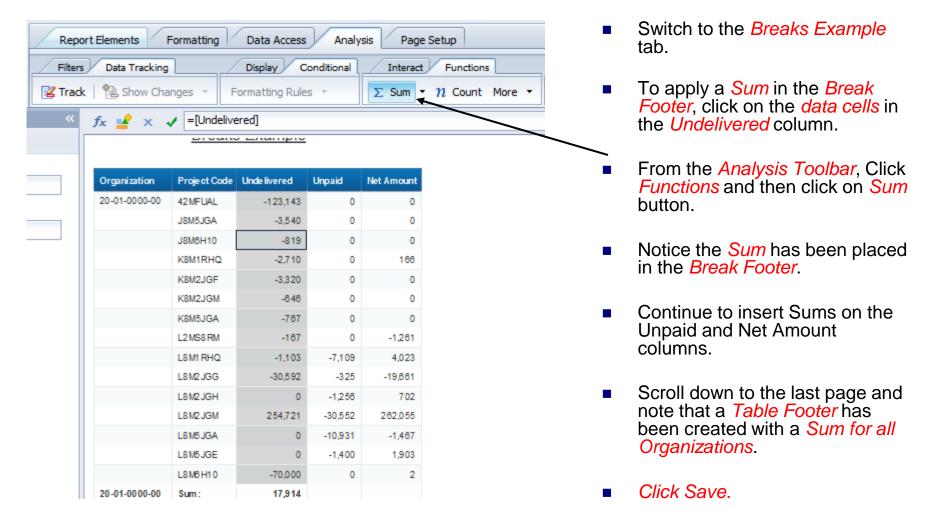
Click Save.

Advanced Report Formatting: Breaks



- Switch to the Breaks Example tab.
- To apply a Break to the Organization column, click on the column data in the Organization column.
- From Report Elements Toolbar ,Click the Break drop-down and select Add.
- Notice the following changes:
 - Header is repeated for each change in the break value
 - Break values are suppressed
 - Break Footer is added
- Click Save.

Advanced Report Formatting: Breaks w/Calculations

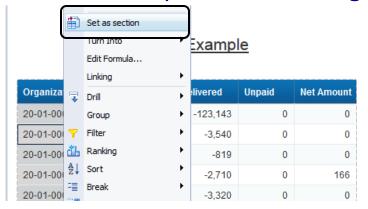


Advanced Report Formatting: Sections



- Duplicate the first tab again to create a tab where you can practice applying Sections.
- Rename the new tab Sections Example.
- Click Save.

Advanced Report Formatting: Sections



L8M2JGM

L8M5JGA

L8M5JGE

20-01-0000-03

Project Code Undelivered

Open Obs by Org4

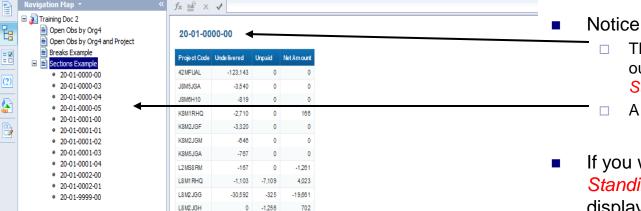
254,721

-70.000

-30.552

Unpaid

- Switch to the Sections Example tab.
- To apply a Section to the Organization column, right click on the data cells in the Organization column to open the shortcut menu.
- Select Set as Section.



262.055

-1,467

1,903

Open Obs by Org4 and Project

- Notice the following changes:
 - The Sectioned values is moved outside of the table into a *Free Standing Cell*
 - A Navigation Map is generated
- If you would like the *Free*Standing Cell for the Section to display on every page, be sure to check the Repeat on every new page option in the properties tab.

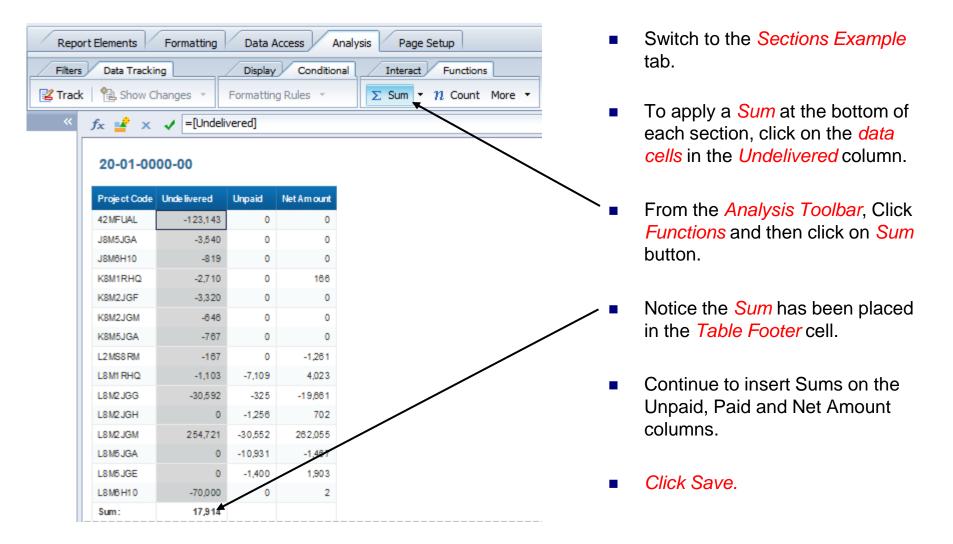
Click Save.

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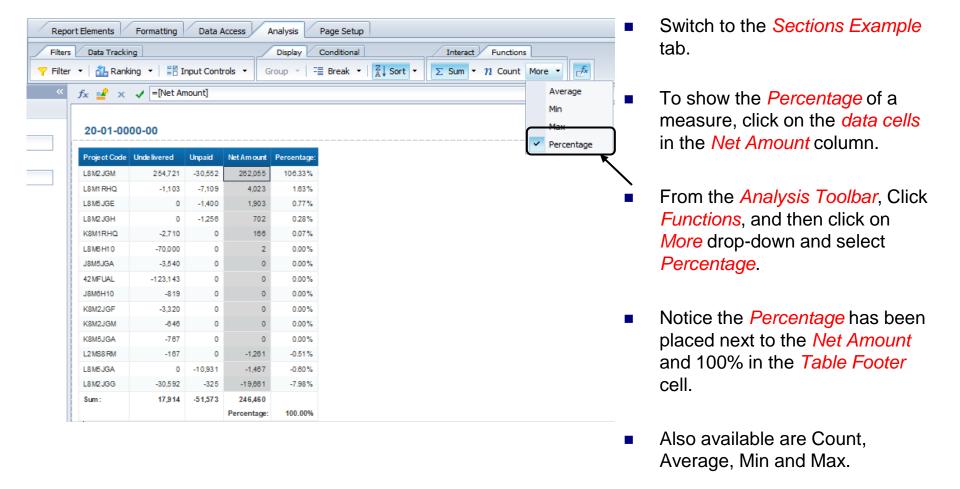
Sections Example

Breaks Example

Advanced Report Formatting: Sections w/Calculations

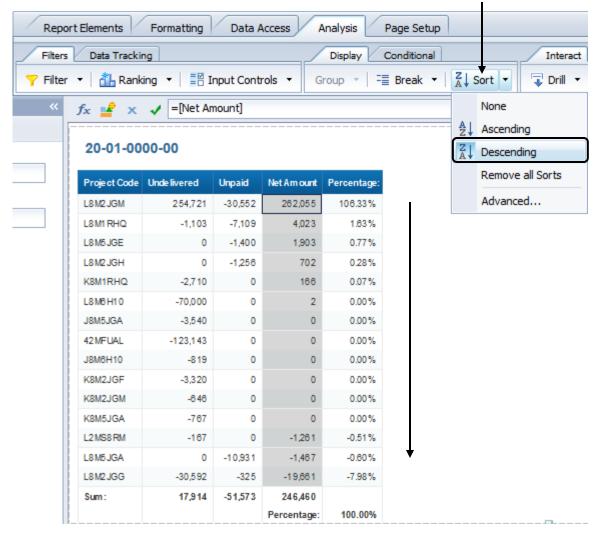


Advanced Report Formatting: Sections w/Calculations



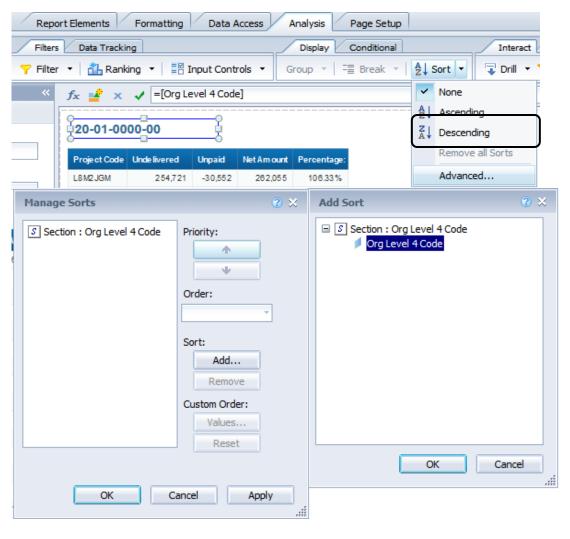
December 2014

Click Save.

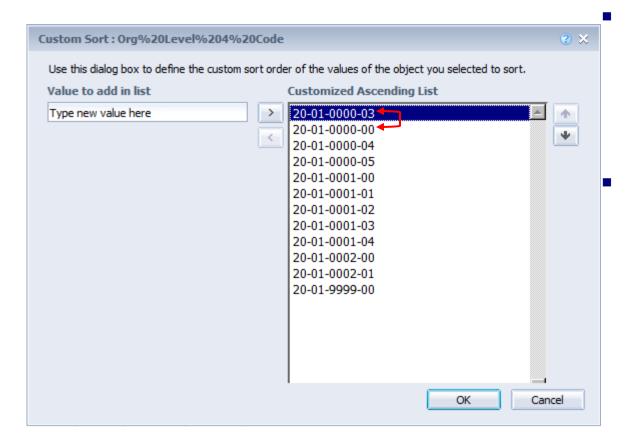


- Switch to the Sections Example tab.
- By default, the data in a Table is sorted by the Dimensions in the table from left to right. In this case the report is sorted by Project Code.
- You may override the default sort. For example, you may wish to have the rows with the largest Net Amount appear at the top of the table.
- Click in the data cells of the Net Amount column.
- From the Analysis Toolbar, Click Display and then click on Sort drop-down and Select Descending.
- Notice the data is now sorted in Descending order by Net Amount.
- Click Save.

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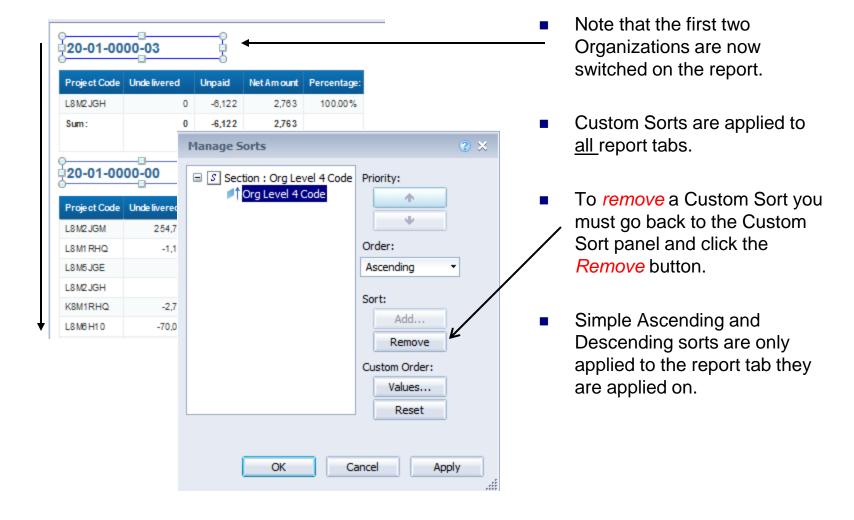


- In addition to Ascending and Descending, you can create a Custom Sort. For example, you may want to see all Organizations, but always have your Organization show at the top of the list.
- Click in the data cells of the Organization section cell.
- From the Analysis Toolbar, Click Display and then click on Sort drop-down and Select Advanced.
- In the Manage Sorts, click on Add button, and select "Org Level 4 Code" and click Ok button.

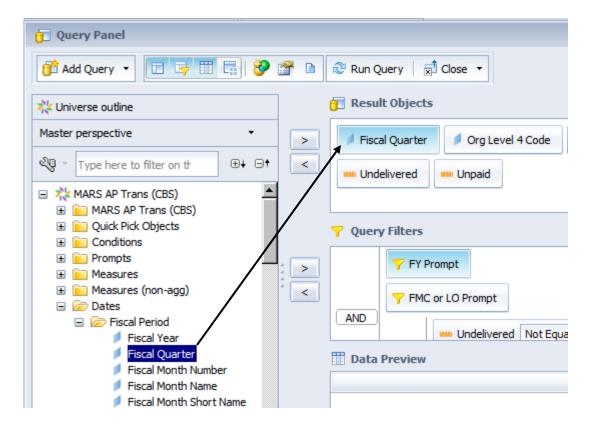


From the Custom Sort panel you can use the up and down arrows to move the values around in any order. For this exercise move the second value to the first position.

Click OK. Click Save.

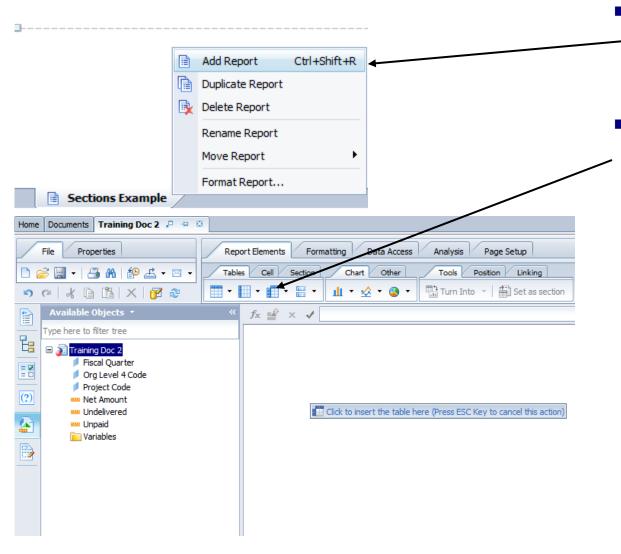


Advanced Report Formatting: Cross-Tabs



- Cross-Tab reports are similar to Microsoft Excel Pivot Tables.
- In this example you will cross-tab by Fiscal Quarter.
- You must first add Fiscal Quarter to the Query.
- Open Training Doc 2.
- Click on Design -> Data Access -> Edit
- Open the Dates / Fiscal Period folder.
- Drag and drop Fiscal Quarter to the Results panel.
- Click Run Query.
- Click Save.

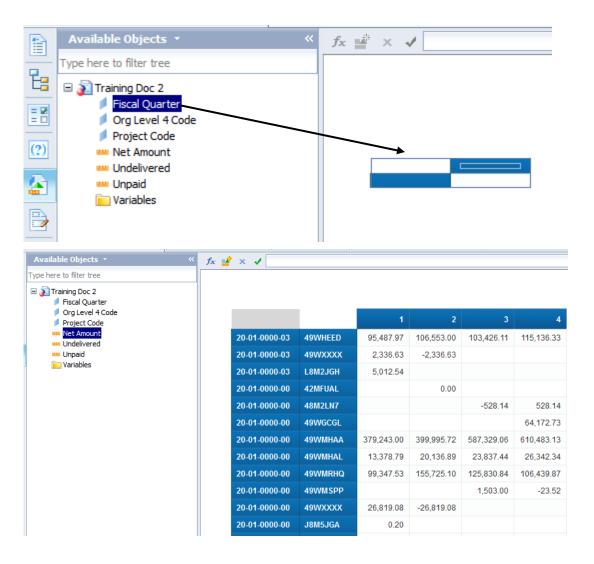
Advanced Report Formatting: Cross-Tabs



Right Click on the tab and select *Add Report* and rename it to *Cross-Tab Example*.

From the Report
Elements Toolbar, click
Tables and then click on
Define Cross-Tab and
drop it in the report body

Advanced Report Formatting: Cross-Tabs



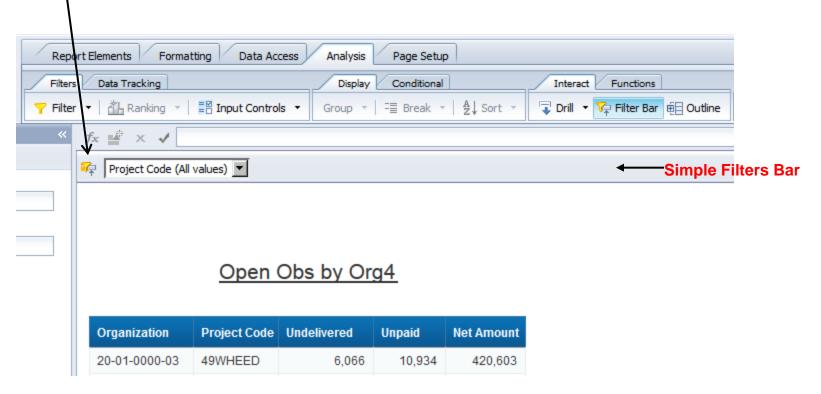
- Click and drag the Fiscal Quarter object and drop it above the table title.
- Drag & drop Org Level 4
 Code, Project Code & Net
 Amount in to the Table
- Click Save.

Analytical Features

- Simple Filters
- Complex Filters
- Fold / Unfold
- Input Controls
- Data Tracking

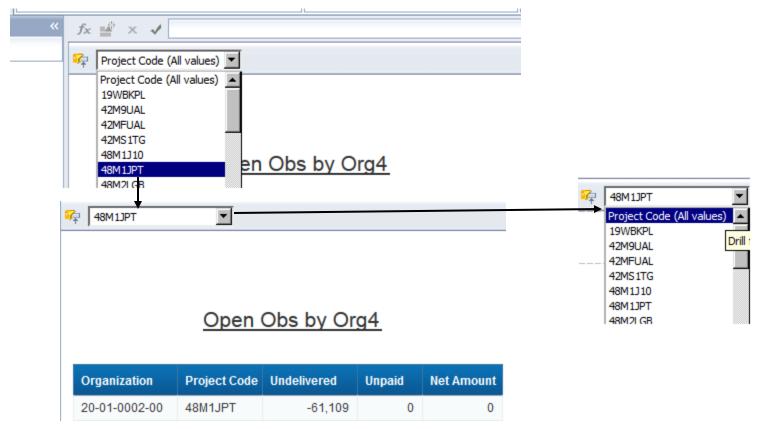
Analytical Features: Simple Filters

- Switch to the Open Obs by Org4 and Project tab.
- From the *Analysis Toolbar*, Click *Interact* and then click on *Filter Bar*.
- Drag and drop the Project Code object into the Simple Filters panel.
- Click on "Add simple report filter" icon, click Others and select Project Code.
- Olick Save.



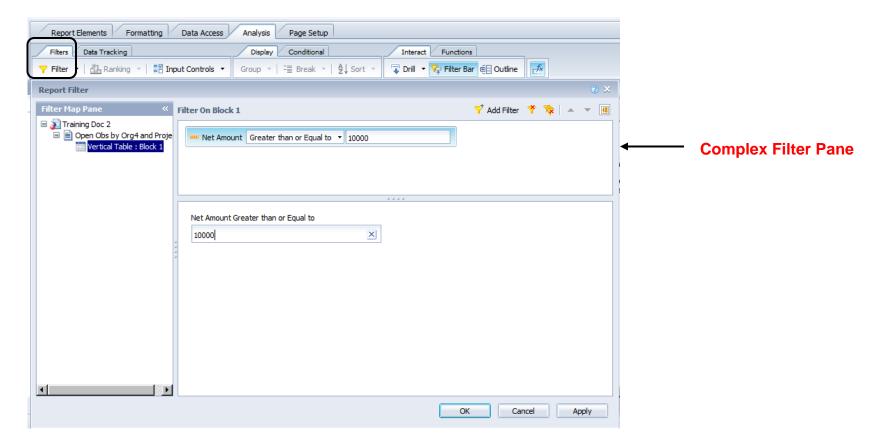
Analytical Features: Simple Filters

- Select a Project from the drop down list.
- Select All Project Code from the drop down list to show all Projects.

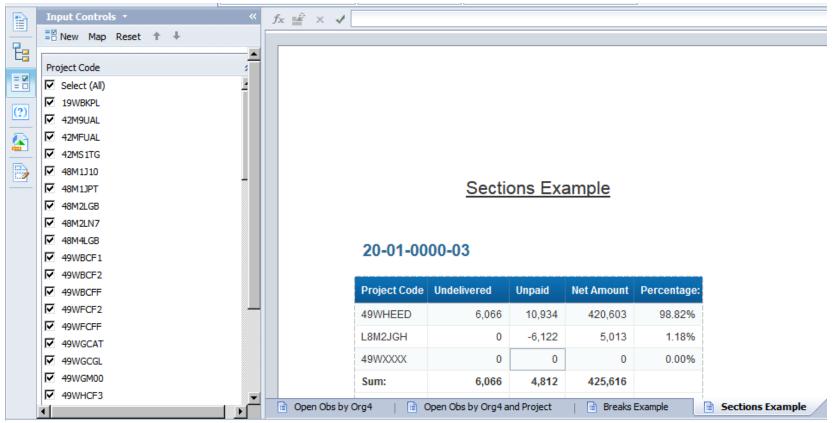


Analytical Features: Complex Filters

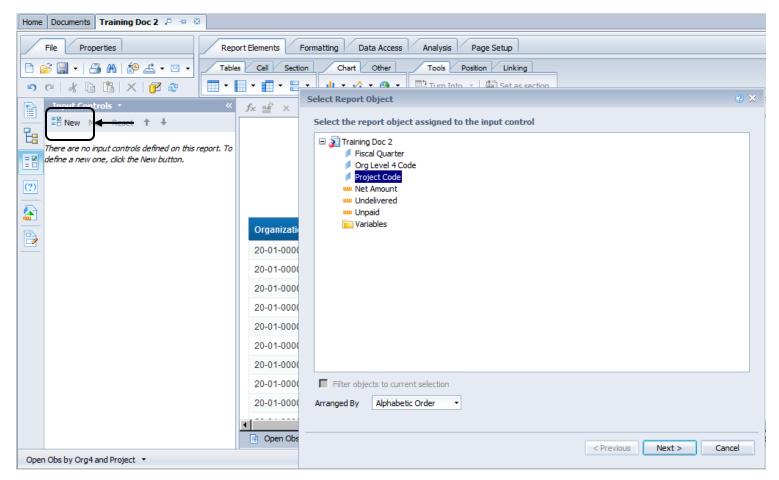
- For more complex filter conditions, from the Analysis Toolbar, click *Filters* and then *Filter* button.
- Click and drag the object to base the filter on into the Filters pane and the Filter Editor will open.
- In this example, drag *Net Amount* to the Filters pane.
- Select Greater than or Equal to as the Operator and 10000 as the value.
- Click Save.

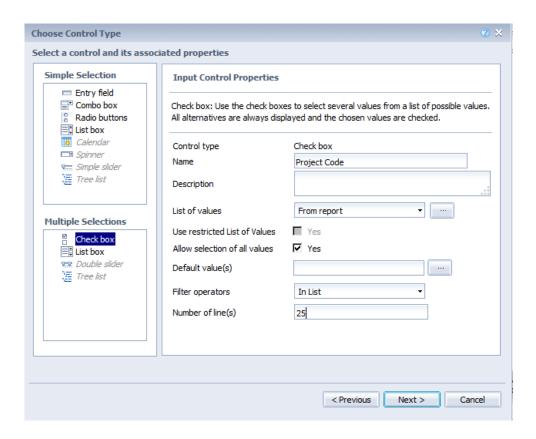


Input controls provide a convenient, easily-accessible method for filtering and analyzing report data. You define input controls using standard windows controls such as text boxes and radio buttons. You associate these controls with report elements such as tables or section headers, and use the controls to filter the data in the report elements. When you select values in the input control, Web Intelligence filters the values in the associated report elements.



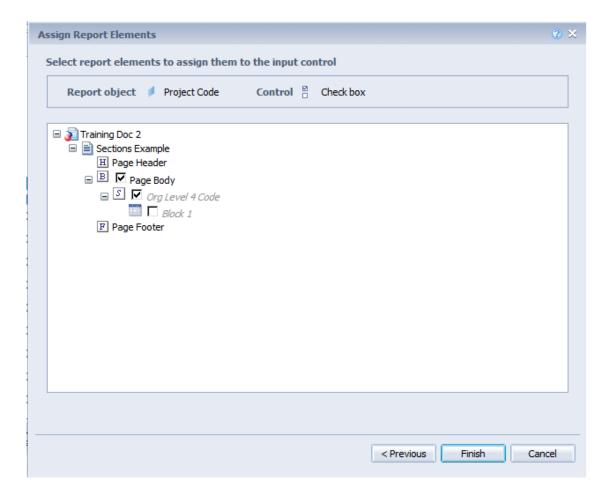
- To create an input control, switch to the *Input Control tab*.
- Click New
- Select Project Code to be assigned to the input control.





- First decide if the control will allow a Single Value or Multiple Value.
- Second pick a Control Type.
- The example on the previous page used a Multiple Value Check Box.

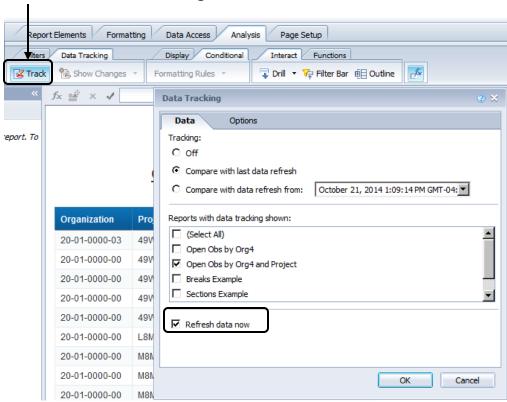
 Finally, determine which Report Elements the Input Control will apply to.



- Finally, determine which Report Elements the Input Control will apply to.
- Click Finish
- Click Save

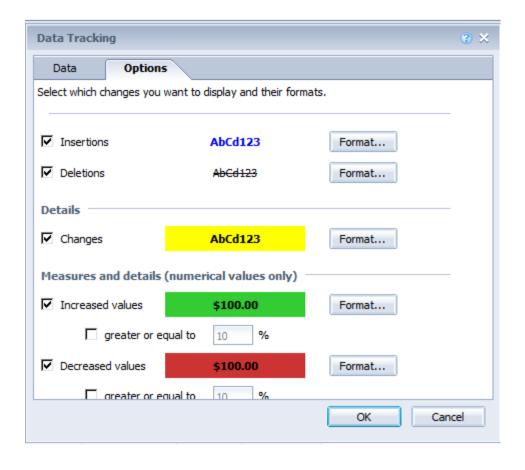
Analytical Features: Data Tracking

- When you track data changes, you select a particular data refresh as a reference point. When you display the data changes on subsequent report refreshes, Web Intelligence places your current data in context by showing how it relates to the reference data.
- To turn on Data Tracking, click the *Track* button.
- Determine if you want the reference data to be updated with each refresh, or to use a particular refresh date a fixed reference point.
- Check Refresh Now to see changes.



Analytical Features: Data Tracking

- You can control the Data Tracking Options:
 - Insertions
 - Deletions
 - Changes
 - Increased Values
 - Decreased Values



Training Material available (See on the MARS Portal!)

- **Webinar**—Recorded step-by-step demonstration video, tailored to MARS users.
- The "Business User" Guide This guide conveys basic concepts and step-by step directions for:
 - system log-on
 - system navigation
 - viewing and refreshing reports
 - saving reports
 - sending reports to other users
- The "Power User" Guide This guide conveys more advanced concepts and step-by step directions for:
 - Creating Webi Documents
 - Filtering Document Queries
 - Report Formatting
 - Advanced Report formatting
 - Analytic Features
 - Cross-tab Reports
- Web-Based Reporting Module Training via Knowledge Accelerator Knowledge Accelerator is a web-based training tool that simulates use of the reporting and querying module. Knowledge Accelerator provides the user with an understanding of how the screens flow and provides the opportunity to practice processes/operations in the tool (e.g., opening a report, refreshing a report, etc.).

MARS Support Information

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